Horizon
Basic Cataloging

Introduction to Cataloging

Horizon cataloging provides you with the tools you need to create records on your system, whether item, bibliographic, or authority. During Implementation, you profile your system so it enforces your rules and preferences relating to the cataloging of records.

You can do original cataloging in Horizon. You create, update, and maintain item records at the Item/Copy List Window. You create update and maintain bibliographic and authority records in the MARC Editor.

Before you can learn the skills to create, update, and maintain records on your system, you should review this section to make sure you understand how to use Horizon. This section describes basic Horizon functionality and workflow.

You will learn about these topics in this manual:

- Horizon review

- Searching overview

- MARC records (bibliographic and authority)

- Item records

Logging into Horizon

You log into Horizon by double clicking on the Horizon icon on your computer desktop. This action launches the Horizon executable. Before you can actually get into Horizon you must supply your login and password information.

Follow these steps to log into Horizon:

1. Double click on the Horizon icon on your computer desktop. Horizon displays the Horizon login screen:

2. Enter your User ID in the User field.

3. Enter your password in the Password field.

> Your system administrator can give you your User ID and password. If you are logging into a training database (instead of your live Horizon database) you may need to use a different User ID and password.
>
> Horizon remembers your Server and Database settings. If you lose these settings due to an electrical surge or other unexpected event, you will need your system administrator to supply the database login and password before you can log into Horizon.

Once you have entered in your password, the **Options** button becomes highlighted. The **Options** button allows you to choose such things as the location you are going to log into, and the font you are going to use. These defaults are set on the training database so you do not have to set them each time you log in. However, if you want to change them you can do so.

4. If you want to change your login options, click **Options**. Otherwise, skip to Step 6.

5. You can change these options:

   - The location you want to log into.
   - The default owner.
   - The language.
   - The font you want to use.
   - The font size you want to use.

6. Mark the Make Default box if you want to save these defaults.

   If you mark the Make Default box, the defaults will be attached to this login. Anyone else who logs in with the same login will see the defaults you set unless they change them in the Options box when they log in.

7. Click **OK**.

   The Horizon Launcher opens: You have successfully logged into Horizon and can now begin using the application.

Navigating the Launcher Environment.

The Horizon user interface is called the Launcher. The Horizon Launcher provides the environment, functionality, and features for all Horizon modules.

Dynix designed the Launcher to be adaptable to the day-to-day workflow at your library. You have a great deal of flexibility in the way you can organize your Launcher, and the tools that you can make available by the click of a button. These options are generally set up by your system administrator.

This is the Horizon Launcher.
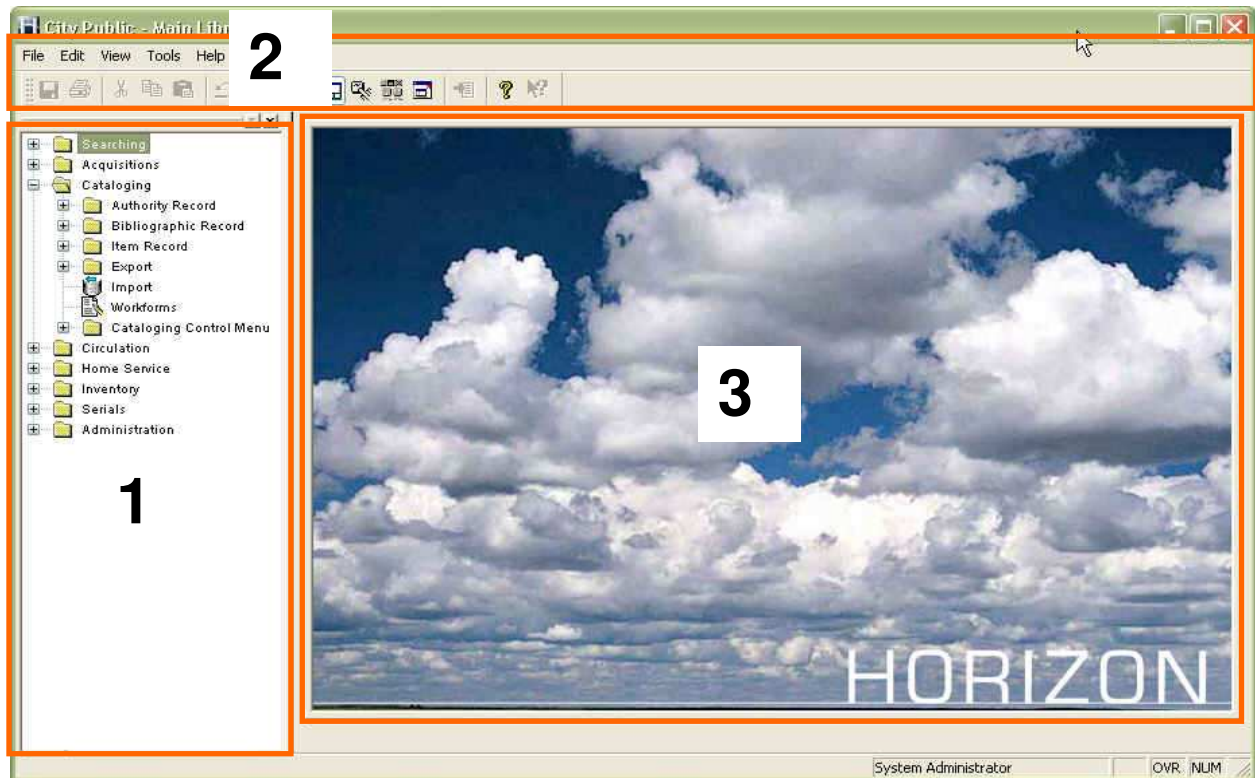
Navigation Bar

The bar on the left is the Navigation Bar (1). You open a folder by clicking on the plus sign (+) next to it. You close a folder by clicking on the negative sign next to it (-).

Processes on the Navigation Bar are represented by icons. You activate a process by double-clicking on it. Depending on your internal library policies, it is possible for you to organize and display the processes according to your preferences. You may also be permitted to place third-party applications and/or links to often-used websites in your Navigation Bar. These options, if available to you, are granted by your system administrator.

Menu Bar and Toolbar

The Menu Bar and Tool Bar (2) provide the tools and options that allow you to interact with the open processes.

The Menu Bar is dynamic. In other words, Horizon populates a specific menu with information relative to the active process (window). The other processes that you have open, and what actions you have taken within those windows help determine the availability of menu options and program functions.

The Toolbar comprises a number of buttons, which, when clicked, launch Horizon processes or other applications. Buttons may be displayed in a small format to conserve screen space, or in a large format for ease of use.

By default, Horizon displays buttons with standard Windows features, such as Print, Save, Cut, Copy, Paste, and so forth. Additionally, you can display any Horizon process in the Navigation Bar as a button for greater accessibility. Finally, if permitted at your library, you can create buttons for any third-party applications as well.

The Launcher has the potential to be the interface point with all programs and workflows that you conduct at your computer. Your system administrator controls the full range of the Horizon Launcher's features and functionality.

Workspace

The picture pane area on the right-side of the Launcher is the workspace (3). This is the area where all the Horizon processes (work windows) open. Windows that open in the workspace can be resized, minimized, and shown full-screen to fit your needs.

There is an option on the View menu to keep your Launcher in Workbook mode. It is a good idea to keep your Launcher in Workbook mode because with it you get a tab for every window that is open. This allows you to easily see which windows are open. You can also click on a respective tab to display the desired window to the front and to quickly move between open windows.

Understanding the Dynamic Nature of Menus

In the following step-by-step example, you will see demonstrated the dynamic nature of menu options.

Follow these steps to review the dynamic nature of menus:

1. Open the Checkout window.

2. Identify a borrower.

3. Click on the Borrower menu to see the options available to you. You notice that you have a limited set of options at this point.

4. Click on the **Clear** button at Checkout to clear the screen.

5. Click again on the Borrower menu.

   With no borrower identified in Checkout, you have fewer menu options available to you. In other words, by identifying the borrower to the system, you have many more menu options to choose from—for example, seeing borrower requests, and blocks and payments history information.

Searching for Records

Horizon searching uses indexes that have been created for the bibliographic information in your database. These indexes give you different ways to find information in your database.
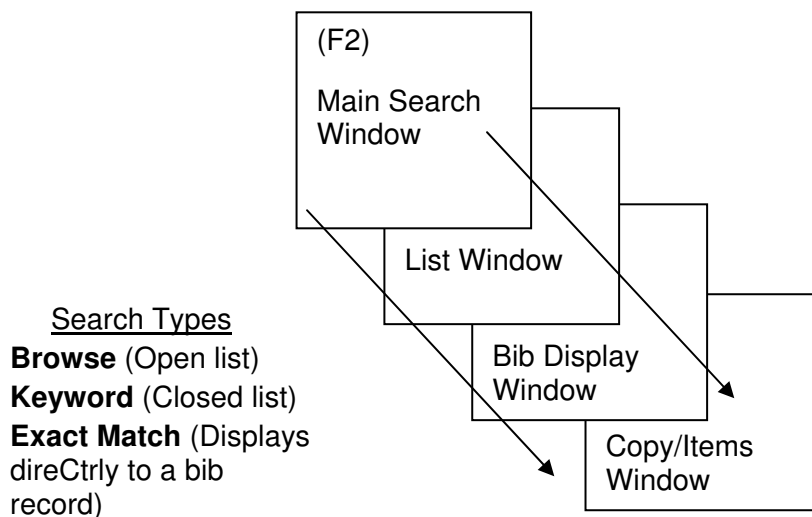
When you set up your production database, your system administrator determines which searches appear on your search menus, as well as their order. Keep in mind that the list of search indexes you see on a training database may be different from the ones on your live database.

There are three kinds of searches in Horizon: keyword searches, browse (or alphabetical) searches, and exact match searches. Keyword searches allow you to search the database for bibs that contain a particular word or words. Browse searches return an alphabetical list of bibs. You are positioned in the list at the word you searched for. Finally, exact match searches return one bib record that matches the search exaCtrly, such as a particular barcode or ISBN number.

The diagram on the following page illustrates the screen progression that occurs when conducting a search. The workflow typically includes four primary screens, but even that may change depending on the type of search you conduct and the results set that is returned from your query.

You will learn about these topics in this section:

- Keyword searches
- Browse (or Alphabetical) searches
- Exact Match searches

(F2)

Main Search
Window

List Window

Bib Display
Window

Copy/Items
Window

Search Types

Browse (Open list)

Keyword (Closed list)

Exact Match (Displays
direCtrly to a bib
record)

Keyword Searches

Keyword searches query the database and return all matches for a certain term.
The term can appear anywhere in the MARC tags and subfields that have been
mapped to that particular index. Keyword searches are often used when you
have general information and are looking for anything that matches.

As an example, a title keyword search might have 245 tag information (title)
mapped, 246 tag information (varying form of title), and 520 tag information
(summary notes) mapped. The search results set that Horizon returns are those
records in your database that matched your search term in the associated
tags/subfields.

Follow these steps to conduct a title keyword search for the
term "sports".

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the Title Keyword search.

4. Enter "sports" in the **Search for:** field.

5. Click **OK**. This screen displays a list of matches, giving basic title, author,
   and pub date information.

Follow these steps to see the full bib record:

1. Select one of the items on the list.

2. Click **Show Detail**. This screen shows the full bib record.

To see the individual item records (or holdings) records, do the following.

1. Click **Show Copies**. If there were items at this location, they would be located on this screen. Since there are not, you can choose to view copies that are at other locations.

2. Click **All Locations**. This screen shows all of the item records that are attached to this bib. Now that you've seen a sample search, here are some other suggestions for keyword searches on the training database. Feel free to experiment with other searches as well

The result screen shows an alphabetical list of subjects. The one you entered, or the one closest to it, will appear third on the list with an arrow pointing to it. The two listed above let you see others that appear near your term.

Browse (Alphabetical) Searches

Browse searches query the database and place you in an alphabetical list at the first instance of the search term. Alphabetical searches are often used when you have specific information (like a specific title or subject). In this case, you want to be positioned in the list according to your entry.

Follow these steps to conduct a title alphabetical search for the term "sports":

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the Title Browse search.

4. Enter "sports" in the **Search for** field.

5. Click **OK**. This screen displays the list of titles in your database with the cursor positioned at the first instance of your search term. If the search term does not exist, you will be at the point in the list (alphabetically) where the entry would normally be found.

Exact Match Searches

Exact match searching lets you search for a bib by its ISBN, an item barcode, or other unique identifier.

Follow these steps to conduct an exact match search:

1. Click the plus sign (+) next to Searching.

2. Double-click the Search PAC process (or press **F2**).

3. Select the ISBN search.

4. Enter an ISBN number in the **Search for** field.

5. Click **OK**. This screen displays the bibliographic record that matches your ISBN search request exaCtrly.

The Send to Command (F10)

The **Send to** button is located on the button bar at the top of your Launcher. This button (or function command) opens a list window dynamically populated based on your current workflow.

You use the **Send to** button to transfer records from one place to another. For example, you can transfer a record that you have searched for to Cataloging, where you can edit it.

Follow these steps to send a record from PAC to the MARC editor:

1. Double-click the Search PAC process (or press **F2**).

2. Display its bibliographic record.

3. Press **F10** to send the item to the MARC editor.

4. Edit the record in the MARC editor.

Beginning Cataloging Procedures

• Introduction to the MARC record
• The MARC editor

In this chapter we introduce you to basic tasks related to MARC cataloging. This workflow is a step-by-step approach, brief by design, giving you the fast track steps you need to perform a given task. This document is intended to serve as a ready reference. Keep it by your computer to use in the event you need a quick refresher on how to perform a given task.

Each MARC record is divided into tags, indicators, and subfields. Tags identify information in fields, telling the computer what kind of data will follow. The information in fields includes such items as titles, authors, publication information, identifying numbers (like ISSN and ISBN), notes fields, and subjects fields.

You can add, edit, and delete tags, indicators, and subfields to customize your bibliographic records. Horizon keeps track of all changes made to your records, which lets you extract accurate reporting and statistical data.

Horizon provides an extremely helpful tool to assist with MARC editing. (You must be connected to the Internet from the computer you are using to have this functionality.) While in the MARC Editor, you can click on any tag and then press **shift + F1** to launch your browser and connect to the Library of Congress website. The browser takes you direCtrly to the part of the website that defines tag, indicator, and subfield information for the tag you selected.

In this section you will receive an overview of the MARC record and the Horizon MARC Editor.

Introduction to the MARC Record

This is how a MARC bib record looks in the Horizon MARC Editor, with the main parts of the record defined:
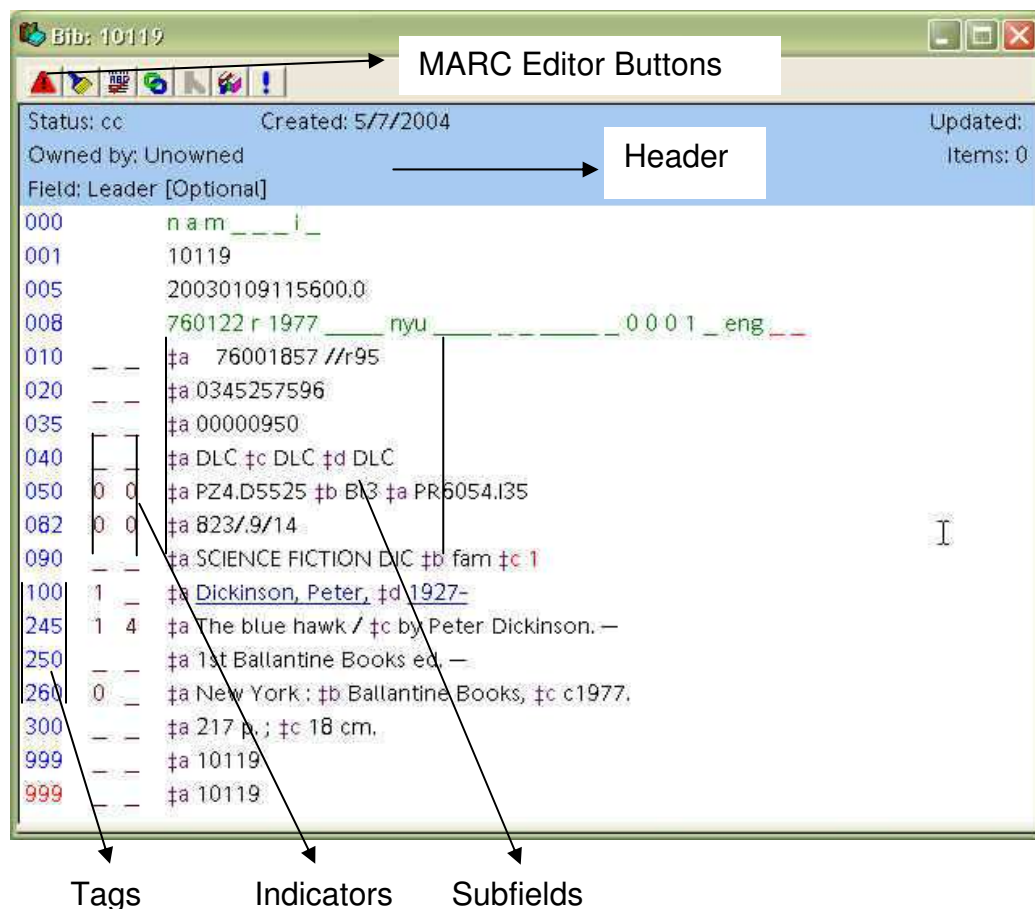
You have several display options that affect the way MARC information displays in the MARC Editor. These options are found on the View Menu. They work like toggles—and are either turned "on" or turned "off":

- **Expanded.** Displays the fixed fields in an expanded view so you can better see the information in each fixed field position. The screen print above is displaying in expanded mode.

- **Vertical.** Displays each subfield on a separate line. This extends the record vertically, but lets you see subfield information more easily.

- **Labeled.** Displays the MARC definition of the tag in the far left-hand part of the screen. This view is especially useful for those new to MARC or with little MARC cataloging experience.

- **Labeled Vertical.** Combines the features of the Vertical and Labeled views.

Tags and Fields

A field contains data that makes up a portion of a MARC record. A tag is a three-digit number that identifies the type of information in its corresponding field. MARC rules govern what information a tag identifies. The term "tag" is sometimes used to designate an entire piece of information, including the three-digit number, the indicator, and all the subfields.

Horizon provides a defined list of MARC tags. When you want to add a tag to a record, you can open the list to choose a valid tag. You can also add a tag by opening a new line and entering the tag number manually.

A MARC record contains these types of fields:

Fixed Fields. Fixed fields are often called control fields. They are divided into positions. Each position contains information about the record in abbreviated form. The information in a fixed field can fill only the predefined length of the field. Fixed field positions have a valid set of values or codes defined by MARC standards.

> Use caution when editing fixed fields. Most information is specific as set by MARC standards. Anything you change or delete should conform to the applicable standards.

Variable Fields. Variable fields can contain varied lengths of information, as specified by the MARC cataloging rules that your library follows. Variable fields can be linking or nonlinking:

Linking fields. These fields include authority-controlled, bib-to-bib, URL, multimedia, and other linking fields. The authority-controlled fields contain information from the authority record (author, subject, or series) to which the bib record is attached. For example, tag 100 is an authority-controlled tag that displays the main author.) Other linking fields contain information relating to the item (such as a URL, electronic data, or a sound file) that the field links to.

Nonlinking fields. These fields contain information about the bib record that is not from another record or associated with another item. (For example, tag 245 is a nonauthority-controlled tag that displays the title.)

Indicators

An indicator is one of two character positions that follow a tag number. Each position is one character long and consists of an underscore or blank (for undefined) or a digit from 0 to 9. The meaning of each indicator varies from tag to tag and is defined by MARC standards. You can edit an indicator direCtrly in the MARC record.

Most indicators contain information that describe the tag. (For example, the first indicator of a 110 corporate name tag indicates whether the name is inverted or in direct order.) You may have fields that use both indicators, neither indicator, or only the first or only the second indicator. When an indicator is not used , it is left blank and referred to as an "undefined" indicator. Some indicators can determine nonfiling characters. These indicators determine how many leading

characters Horizon ignores when it creates a list that you can browse alphabetically.

For example, the title *The one and only* has a nonfiling indicator of "4." Horizon ignores the first four characters (the space after "The" counts as a character) and files the title using "One" in an alphabetical list. If you leave a nonfiling indicator blank, Horizon checks the Article table when saving the record to see if it can enter an indicator for you.

Subfields

A subfield contains information within a field. Each subfield starts with a delimiter and is labeled with either a letter or number, called a subfield code. You can edit the subfield code without changing the information in the subfield. You can also change the information. For example, in the previous MARC 21 publication tag (260), the three subfields have the codes *a*, *b*, and c respectively.

Subfields may or may not display in a tag in alphabetical order; order is determined by standard cataloging rules. Also, some subfield codes may be repeated (duplicated) within a tag.

Horizon provides a defined list of MARC subfields. When you want to add a subfield to a field, you can open the list to choose a valid subfield. You can also add a subfield by entering the subfield code manually. To edit a subfield in an authority-controlled tag, you can edit the corresponding authority record for that tag, or you can edit the subfield in the bib record.

> If you edit an authority-controlled subfield in the bib record, Horizon breaks the link and you may affect the authority record. Any further linking of that edited information is based on the link settings.

Validity and Repeatability of Tags, Indicators, and Subfields

When you try to add a tag, indicator, or subfield to a record, Horizon verifies that the tag is valid for that record or that the indicator or subfield is valid for that tag—according to MARC standards as your system administrator has defined them for your database. Horizon also checks to see if the tag or subfield is repeatable according to your library's defined MARC standards.

If you add a tag, indicator, or subfield that is not valid or repeatable, and if you have activated Error Checking, Horizon displays a message in the error window telling you that the tag, indicator, or subfield is not valid or is nonrepeatable. Horizon may also display the erroneous information in a different color, depending on your field settings.

Features of the MARC Editor

You have learned that the MARC Editor is the place where you create, update, and delete bibliographic and authority records in Horizon. The next section teaches you how to use the MARC Editor. You get records into the MARC editor by searching for them and sending them to the MARC Editor.

This is the MARC Editor, with a bib record open in the Editor and the editing options displayed on the screen:
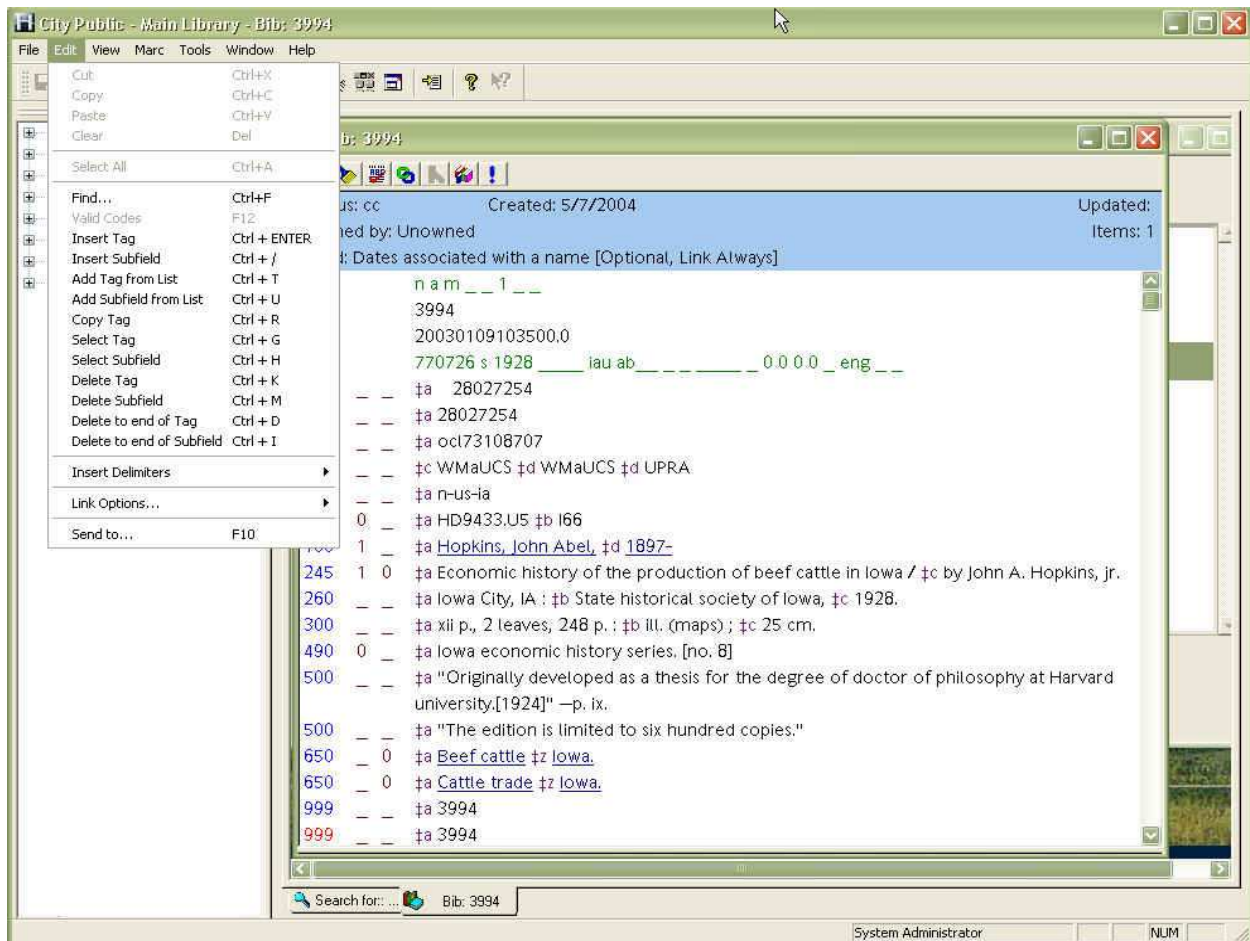
You can access editing options from the Edit menu, as shown above, or you can display them by making a right button click on the mouse. Horizon displays context-sensitive options based on the tag or subfield position of the cursor.

If the options that you need do not display with the right button mouse click, make sure you have placed the cursor in the correct tag or subfield. For example, if you are looking for options that pertain to authority records, you must right click in an authority-controlled field or you will not have the options available to you.

Using the MARC Editor

In This Section Learn About:

• Opening a Bib Record
• The Record Header and the MARC Editor Buttons
• Adding and Inserting Tags and Subfields
• Editing a Bib Record
• Copying a Bib Record
• Importing a Bib Record
• Exporting a Bib Record
• Using Z39.50 to Import a Bib

The MARC Editor is designed to give you a high degree of flexibility in the way you display and work with MARC records.

While in the MARC Editor, the Customize Editor option on the Tools Menu lets you personalize the MARC Editor in these ways:

o Change the display colors of different parts of the window.

o Control spacing between different parts of the window.

o Determine characters used for delimiters.

o Select font and background display settings.

o Select keyboard shortcuts characters.

o Determine bib and authority linking preferences

Customize Editor is a system administration feature. Your system administrator will take care of these and other MARC Editor profiling matters, such as workform setup, creating import profiles, and determining the syntax and validation of tags and subfields.

While in the MARC Editor, you have several display preferences to choose from; these are located under the View and Window Menus.

Opening a Bib Record

You open an existing bib record on your system by searching for the record and then using the Send to command (**F10**) to send the record to cataloging. Horizon provides tools in the Cataloging folder in the Navigation bar that let you display a specific bib or authority, provided you have its unique number to search on.

Be aware that searching for a record in an authority list (author, subject, or series) then using the Send to command results in sending the authority record into the MARC Editor.

Follow these steps to open a bib record in the MARC Editor:

1. Press **F2** to conduct a search.

2. Search for the desired bib record.

3. Press **F10** to send the record to the MARC Editor. The system displays a window like this one:

4. Edit the record. Use standard key commands for Microsoft Windows applications (for example, **Ctrl + C** to copy, **Ctrl + X** to cut, **Ctrl + V** to paste, and so forth).

Most editing options are on the Edit Menu. You can also do a right mouse click anywhere in the record. Horizon will display context-sensitive options for you to choose from. (In other words, the exact location of your mouse click determines the options that appear, whether you are in a tag, subfield, or indicator, for example.)

5. When you have completed your editing, save and close the record.

Multiple people can open the same record in Horizon at the same time. Horizon recognizes when there are concurrent users. The first person to save changes locks the record. The other people, as they attempt to save any changes they made to the record, receive a Concurrency Error message.

If you receive a Concurrency Error message, you will need to close the record without saving your changes. When you open the record again, it will display the changes made by the first person to have saved the record. You can then determine whether to make additional changes, or not.

The Record Header and the MARC Editor Buttons

The colored band across the top of a record is the header. It displays in a different color to call attention to the information in the header. One of the very helpful features of the MARC Editor is the last field that displays in the header. It is a dynamic display that identifies the current tag or subfield you are currently working with.

Notice that the header also supplies current status, creation and update dates, ownership (if used), and the number of items attached to the bib record.

Across the top of the header is an array of six buttons that provide key functionality in the MARC Editor. This is the button array:

MARC Editor buttons are defined in this list:

Button	Description
	Show/Hide Errors. Toggles between showing errors at the bottom of the MARC Editor (if applicable), and hiding errors.
	Reformat. Reformats the record to display tags in numerical order; it also cleans up the record by deleting any unused tags or subfields.
	Spell Check. Spell checks text fields where it makes sense to do so—for example, the 245 and 5xx fields.
	Link. Use to create a link between records open in the MARC Editor, or to add See and See Also links to authority records.
	Merge. Merges two or more bib records. Items attached remain with the surviving record. You can also merge authority records. Bibs linked to authorities remain with the surviving authority record.
	Items. Displays the Copy/Item List window, where all item creation, updating, maintenance, and deletion occur. You can also access the Copy/Item List window by searching (**F2**) and sending to (**F10**) the Copy/Item List.
	Control Record. Displays record creation, update, and status information. Use this feature to see specific details for a given record.

You will learn the context and workflow associated with each of these buttons as you work through the tasks in this manual.

Adding and Inserting Tags and Subfields

Horizon provides quick and useful tools to help you with your MARC editing. Most editing commands can be found on the Edit menu when in the MARC Editor; they are also accessible as shortcut key commands for those that prefer to keep their hands on the keyboard.

You can also display your edit options by executing a right-button mouse click in the MARC Editor. The right-button mouse click is context sensitive, displaying information specific to the tag, indicator, or subfield within the record.

Many of the editing options can be divided into two categories: Insert commands and Add commands.

Insert Commands. Assumes you know the tag or subfield information you want to enter and you just need a blank tag or subfield to work with.

Add Commands. Assumes you are uncertain of the tag or subfield information you are working with and you would like to make a selection from a list of valid MARC cataloging choices.

Follow these steps to add a tag or subfield into a bib record:

1. Send a record to the MARC Editor.

2. Position your cursor in the record at the place you would like to add a new tag or subfield.

3. Select the Add Tag option from the Edit menu (or from the right button click within the bib record). Horizon displays a window like this one, listing your editing options:

4. Select Add Tag (**Ctrl + T**) to add a new tag; or select Add Subfield (**Ctrl + U**) to add a new subfield. When you use the add command, Horizon displays a list of valid tags or subfields, as the case may be, for you to choose from.

5. This is an Add Tag list with the 246 tag selected:

| Tag ID	Description
096	Locally Assigned NLM Call #
098	Other Classification Schemes
099	Local Free-Text Call Number
100	Main Entry - Personal Name
110	Main Entry - Corporate Name
111	Main Entry - Meeting Name
130	Main Entry - Uniform Title
210	Abbreviated Title
211	(Obsolete) Acronym or Shortened Title
212	(Obsolete) Variant Access Title
214	(Obsolete) Augmented Title
222	Key Title
240	Uniform Title
241	(Obsolete) Romanized Title
242	Translation of Title by Cataloging Agency
243	Collective Uniform Title
245	Title Statement
246	Varying Form of Title
247	Former Title
250	Edition Statement
254	Musical Presentation Statement
255	Cartographic Mathematical Data

Add Tag

Cancel

6. Select the appropriate tag from the list and click on the **Add Tag** button. Horizon adds the tag into the MARC Editor at the point of insertion.

If you inadvertently added the tag in the wrong place, you can use the **Reformat** button at the top of the MARC Editor to clean things up when you have finished with the record.

Be careful that you do not press **Reformat** before you are done editing the record. Besides rearranging tags in the MARC Editor, **Reformat** also strips any blank tags or subfields from the record. If you are doing original cataloging, that means you will have to add back in the default (workform) tags and subfields that were deleted.

7. The workflow for adding a subfield is pretty much the same as adding a tag. You simply select the Add Subfield option from the list instead of the Add Tag option.

This is an Add Subfield list. It displays valid subfields for a 246 tag:
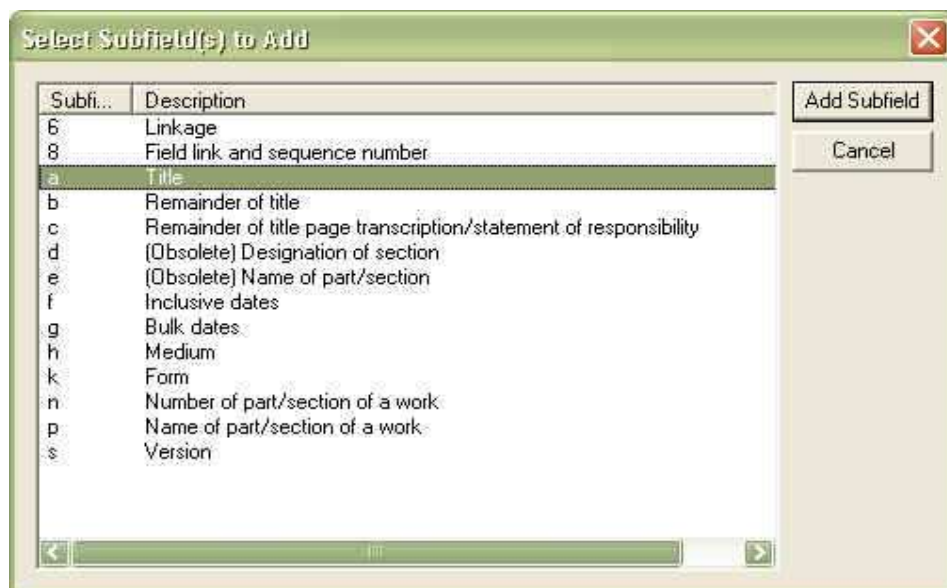
As you can see, using the Add command displays a list of valid tags or subfields, as the case may be. You can make a selection from the list. There are other times when you know which tag or subfield you want to enter and you simply want to insert a blank tag or subfield so you can add it yourself. You use the Insert command in these instances.

Follow these steps to insert a tag or subfield into a bib record:

1. Send a record to the MARC Editor.

2. Position your cursor in the record at the place you would like to insert a new tag or subfield.

3. Select the Insert Tag option from the Edit menu (or from the right button click within the bib record).

Horizon displays a window like this one, listing your editing options:

The Insert command adds a new blank tag into the record.

4. Type in the tag that you want and Horizon supplies the default indicators and subfields for that tag based on your predetermined profiling selections.

You use the insert subfield command when you are within a tag and you know the subfields you want to enter. Typically, catalogers who know exactly what they want to do in a record (and who want to speed up their entry), use the Insert subfield command to keep their hands on the keyboard and expedite the process.

Notice that your commands to delete tags and subfields and to copy tags and subfields are also accessed from this list. Options relating to authority records are displayed when you access this list from within an authority-controlled field (from the right button mouse click in the MARC Editor).

Editing the Record

In this exercise you will learn some additional workflow for editing a record in the MARC Editor.

Follow these steps to edit a bib record:

1. Open a record in the MARC Editor.

2. Click on a tag in the record and notice that the last line in the header information gives you the MARC definition of the tag.
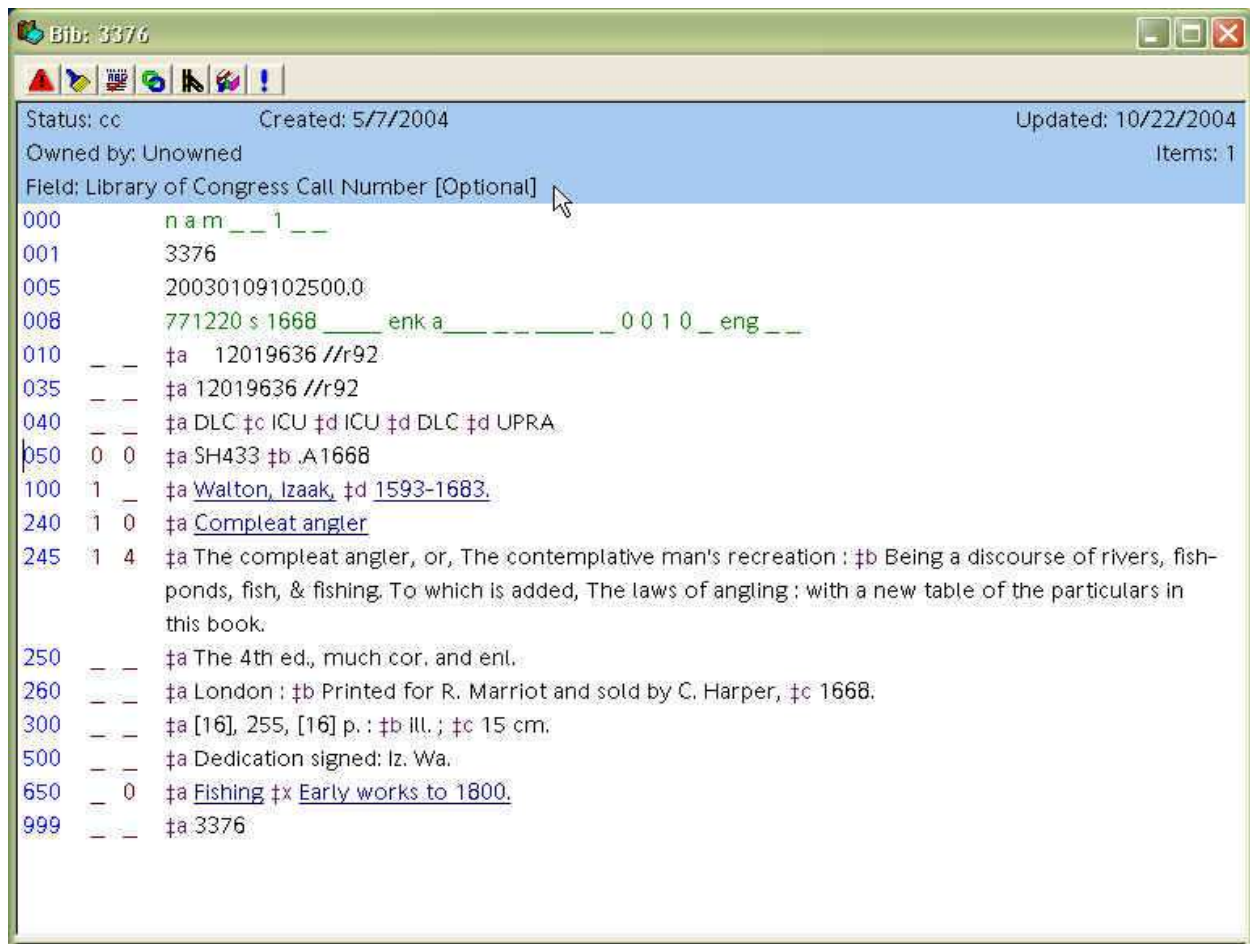
In the example presented, the cursor is in the 050 Tag. Notice the arrow at the bottom of the window header, showing that this tag is the LCCN. In other words, Horizon provides you a dynamic listing that identifies the MARC information that relates to the particular tag or subfield you have currently selected.

3. Place your cursor over the information displayed in the author field (100 tag). Notice that the shape of the cursor changes.

4. Double click on the 100 tag. Horizon displays the author authority:

The record is shown in Expanded view, meaning the fixed fields (tags 000 through 008) have been identified and opened up for your convenience. You add and update See and See Also references here.

Creating See and See Also references are explained in detail in the Intermediate Cataloging training.

You probably noticed that the MARC Editor displays portions of bib records in different text colors. These are the default text colors assigned to records in the MARC Editor:

- **Red.** Error text. Horizon does not recognize the information in this tag or subfield. This alerts you that there may be a problem with the information currently displaying in this field. Your system administrator has done some advanced work to prevent locally defined fields from displaying in error text.

- **Navy Blue.** Linked field. Text displaying in the dark-blue color, and carrying an underline are most often authority-controlled fields, though you might have other types of linked records cataloged.

You can double click on a linked field in the MARC Editor to go to that linked record. If the record is an authority, Horizon will display the authority record in the MARC Editor.

- **Orange.** Delimiters.

- **Dark Green.** Foreground text. You can assign this color to different parts of the record, if desired.

- **Light Green.** Read-only text. Text designated as read-only (based on library staff login, if applicable) displays in this color.

5. Practice editing the record currently displayed. These reminders will help you navigate within the record:

- **Cut, Copy, Paste.** The MARC Editor works a lot like a word processor. Use your mouse to select text and then cut, copy, and paste it between records or from place to place within a record.

- **Drag and Drop.** When copying information from one record to paste it into another record, select (highlight) the information in one record and drag it into the next record.

- **Tab and Shift + Tab.** The **Tab** key takes you forward through the record, field by field. The **Shift + Tab** key combination takes you backward through the record, field by field. If you have a keyboard with arrows keys, they will work as well to move from place to place in the record.

- **Accelerator Keys.** For those who prefer to keep their hands on the keyboard, Horizon is programmed so you can perform many functions from the keyboard.

  The **Alt** key is programmed as your accelerator key. Pressing this key causes an underline to appear on the menu headings at the very top of the Launcher. Pressing **Alt** in combination with one of the underlined letters opens that menu; entering any other underlined option in the menu will perform that command.

  For example, if I enter **Alt +E**, the Edit menu opens. I can then enter **M** to add a tag from a list. Horizon displays the tag list window and I can select the tag from the window.

  Practice with accelerator keys. Once you have memorized them you will find that this technique accommodates the fastest workflow.

6. Click on the **Save** button to save any changes you made to the record. If you attempt to close the record without saving, Horizon will prompt you.

7. Press **Esc** to close the record.

Copying a Bib Record

Copying a bib record is a quick way to create a new record when much or most of the information in the existing record is similar or the same as what you want to appear in the new record.

Follow these steps to copy a bib record:

1. Open a record in the MARC Editor.

2. Select File, Copy Record. Horizon displays a carbon copy of the original:

Because the new bib record is a carbon copy of the original, it can be confusing as to which record is which when you start to edit. The new bib will be identified at the top of its window as a new record; additionally, the tab at the bottom of the workspace will identify the record as being new.

3. Make any changes to the record. See the previous task if you need any help remembering basic navigation skills within the record or if you need a reminder on how to access editing commands or features.

4. When you have finished editing the record, press **Ctrl + S** to save the record (or select File, Save).

Horizon saves the new record. The new record will display its newly system-assigned bib number where it was moments ago displaying "New." The bib number will also display at the very top of the Horizon window (providing that record is displayed to the front in the MARC Editor), and on the workspace tab as well (providing the Workbook mode is activated).

Importing MARC Records

The most common way to add records to your Horizon database is to import them from a trusted source, such as Library of Congress, OCLC or another record vendor.

Horizon uses an Import Source Profile to determine the specifics of what information you want to come into your database on the import. The Import Source Profile also determines such things as the details for automatic record creation when no matches exist on the database, the match points Horizon uses to overlay existing records in the database, and the status Horizon gives to any newly imported records.

You can import records that you have downloaded to your computer, or that you have stored on a CD-ROM or floppy disk. It is common to download records through the Internet, provided the vendor in question allows you to export MARC records direCtrly from their database.

Follow these steps to import MARC records:

1. Open the Import window by double clicking on the Import icon in the Cataloging menu (its default position). Horizon displays the Import window:

2. Enter the path to the file you are importing in the Import File field. For example, if the file you are importing is on a CD-ROM in your D: drive, click on the **File** button and select the D: drive, then select the applicable file from the CD-ROM.

3. Select an import source. Your system administrator will have already set up your import source profiles. You should have a clear understanding of which profile to use for a given situation. The profile you select will determine whether or not to create item records, the match points that have been selected for overlays, and the status of records newly imported, among other things.

> For a complete discussion of all fields on the Import window, refer to your Cataloging Users Guide. It should help you to know that once you select an import source profile, the settings on the Import window are static and consistent as you bring new records in. Once you know the settings to use for an import source, you will infrequently have to alter them.

4. Press **OK** to start the import process. Horizon displays a counter window like this one, showing you details about the import:

You can see from this window that Horizon displays information about bibs, authorities, and items that were imported. (These displays will vary depending on the import source you selected.)

When the import is complete, Horizon displays a MARC import complete message in the Messages portion of the window. Errors, if they occur, are also noted.

5. Click **Close** to close the Import progress dialog box.

6. If errors occur, open the Data Load Error Log (located in the Administration menu) to see what errors occurred. Certain errors indicate unknown information was appended to the end of the file, and you can simply delete the message from the log. Other errors indicate more detailed problems with profiling and may require you to seek additional help for resolution.
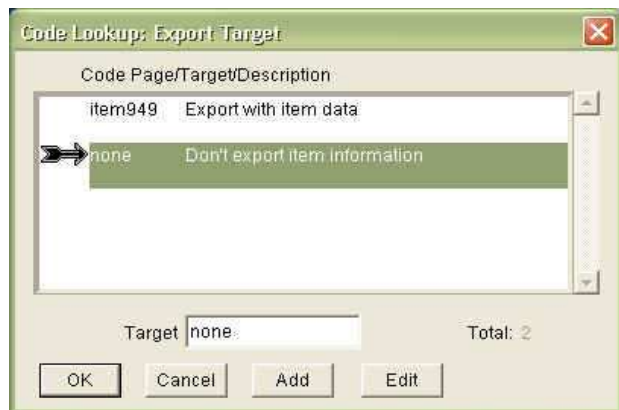
Exporting MARC Records

You can export MARC records in your system to a file on your computer. You can then email the file to others.
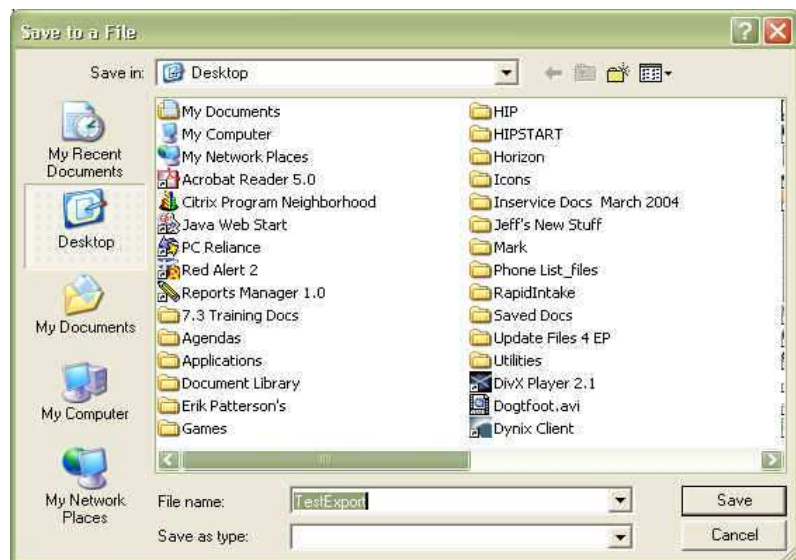
Follow these steps to export a MARC record:

1. With the record you want to export displaying in the MARC Editor, select File, Export Record(s).

   Horizon displays the Code Lookup window:

2. Make your selection from the list of available codes and press **OK**. Horizon displays a save location dialog box.

3. Navigate to the location on your computer or network and save the record as you would any other data file. (Be sure to give it a unique name and remember where you saved it.)

Using Z39.50 to Import Bibs

You can use the z39.50 standard protocol to import records from the Library of Congress and into your database. Horizon comes with the required files so you can connect to the Library of Congress via z39.50.

Be aware that for z39.50 searching to work, you must do some profiling ahead of time. If you use z39.5 0, your system administrator will have set up the necessary profiling ahead of your training session.

Follow these steps to import a file using z39.50:

1. Open the Searching folder in the Navigation bar and double click on the z39.50 Search option. Horizon displays a list of available z39.50 servers.

2. Select the desired server and click **Connect**. Horizon displays a search window like the following (this example is a connection to Library of Congress):
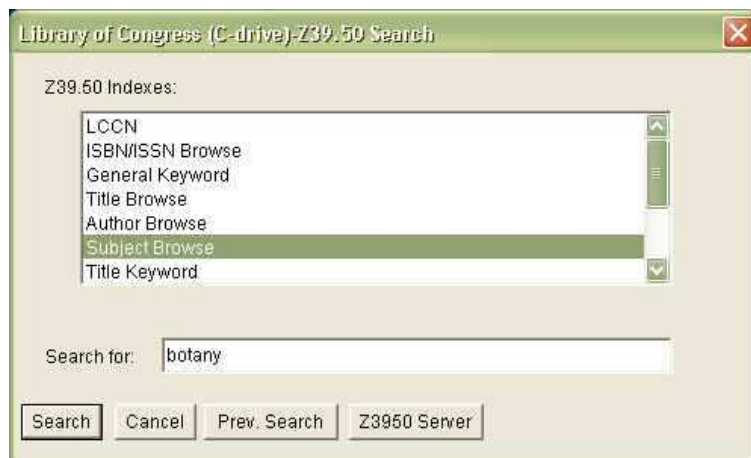
3. Select an index and enter a search term (in the example above we selected a subject browse search on the term "botany").

4. In either the List window (to multi-select), or at the bib display (to select singularly), press **F10** to send the record(s) to the MARC Editor if you want to add the record(s) directly into Horizon. The record displays in the MARC Editor.

5. Press **Cntl + S** to save the record (or select File, Save). The record is saved into the Horizon database.

If you want to save the record(s) to a file and then import them into Horizon (using an import source profile to prevent unnecessary duplication of records), select the Export Cataloging Records option from the Send to window to send the records to a file on your computer. You can send as many records as you like and append them to the saved file before importing into Horizon.

Authority Records

Certain tags and subfields in a MARC record contain data used for searching—such as author, subject, and series—where uniform entries are important for accuracy and consistency. To make sure that these entries are uniform throughout the database, Horizon controls these tags and subfields, referred to as authority-controlled tags or subfields.

Suppose you conduct an author browse search for the name "Jones, Walter." Horizon displays a search results window that places you in the author authority list at the point where Jones, Walter would appear, if he were actually in your database. Sending the record to the MARC Editor sends the authority record (not the bib record). You create, update, copy, and delete authority records in the MARC Editor.

Only one authority record should exist for each authority entry. This authority record is then linked to all bib records that display information the authority record contains. You can also link authority records together, for example to create See and See Also links in your database.

There are two parts to the Horizon software that help you maintain orderly control your authority records:

- **Authority link type.** Determines the action Horizon takes when information is added into an authority-controlled field.

- **Browse link options.** Provides a link through StaffPAC (by default), where you can search your existing authority catalog to verify whether or not the authority exists as presently represented.

If the record exists in your database, you can form a link to the existing record to validate it. If the record does not exist on your database, you can then add it as a new authority (assuming you have the privileges to do so).

The default behavior of these settings is set in the Customize Editor window (Tools, Customize Editor from the MARC Editor window). The system administrator sets these defaults and has the ability to change them, if necessary.

Authority Link Type

The authority link type setting determines how Horizon deals with information you enter into an authority-controlled field in the MARC Editor. The action that Horizon takes occurs at the time you save the changes made to the record.

Horizon gives you three options when setting up authority link types:

- **Always link.** Creates a new authority for your entry into the field, assuming no matching authority is found. Always link means Horizon *always* creates the new authority (if no exact match to your entry is found).

  As an example, suppose you enter a new author by the name of Thomas P. Jones in the 100 tag, with birth information of 1945 in the d subfield. Suppose as well that there is a Thomas P. Jones already in your database, but without the birth information in the d subfield. At the time you save the record, the Always Link option would create a new authority record for Thomas P. Jones because of the new d subfield information.

- **Link on match.** Links to an existing authority only if it matches exactly, including subfield information. If a record already in the system did not match exactly your new entry, Horizon does *not* create a new authority.

  In the preceding scenario, because a new authority was not created, your new (unmatched) entry in the authority field would remain unlinked. As such, it would also not be indexed and would not be searchable.

- **Never link.** Never creates a new authority in the system. Selecting this setting requires you to manually add (force) any new authorities into your system.

Browse Link Options

The browse link setting has a default shortcut key command of **Ctrl + B**. When adding any entry to an authority-controlled field, you would enter either partial or full information into the field and then press **Ctrl + B** to browse your existing authority catalog to see if the entry already resides in the catalog.
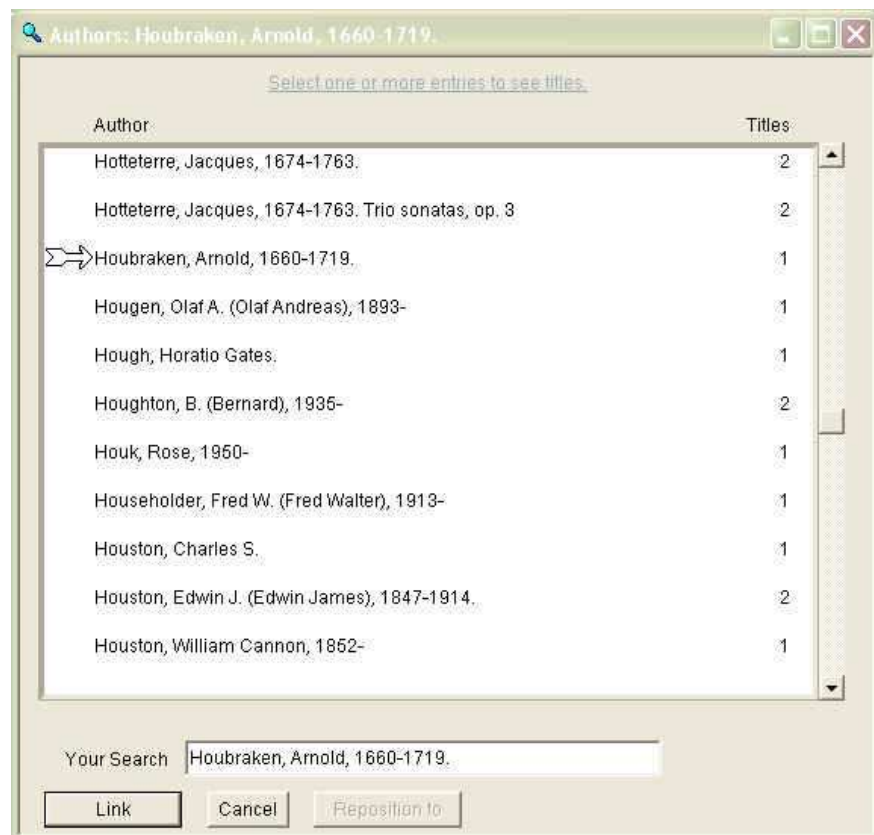
If the desired authority exists, simply click **Link** to create a link to that authority. If the authority does not exist, your authority link type setting determines whether or the system creates a new authority.

Adding (Attaching) an Authority to a Bib

Having received an introduction to authority link types and to browse link options, you are now ready to edit an authority-controlled field so you can see first-hand how Horizon uses these tools to help you manage and maintain your authorities.

Follow these steps to add an authority to a bib:

1. Open a record in the MARC Editor.

2. Enter the new authority in the appropriate field. For example, add a new author into the 100 tag.

3. With the cursor in the newly created 100 tag, press **Ctrl + B** to browse for a link in your authority catalog. The system displays the author (in this case) list, positioned at the point the new authority would appear in the list:

4. If the desired author already exists in your database, simply select the author from the list and press **Link** to create a valid link to the existing authority record.

5. If the desired author does not exist, press **Cancel** to dismiss this window.

   With an unlinked authority, the action Horizon takes once you save the record depends upon the authority link type that you have selected as your default. There are three possibilities:

   - **Always link**. Always creates the new authority when you save the record (assuming no match was found)

   - **Link on match**. Links to an existing authority *only* if your entry matches exactly as entered into the record. If a matching authority record does not exist, Horizon does not create one. Later, if you create a matching authority record, Horizon creates the link when you save the record.

   - **Never link**. Never creates a system-generated authority for the record.

6. . Press **Ctrl + S** to save the record.

7. Press **Esc** to close the MARC Editor (optional).

Item Records

In This Section Learn About:

•	Searching for an item record
•	Creating a new item record
•	Editing an item record
•	Copying an item record
•	Deleting an item record

Item records carry barcodes and represent individual holdings (items) in the library. You can view items in StaffPAC. You can do limited editing to the item record in Circulation using the Edit Item button. You edit items in Cataloging at the Copy/Item List window.

You can access the Copy/Item List window from the MARC Editor, or by searching for a record and then using the Send to (**F10**) command to send the item to the Copy/Item List window.

The item record contains collection, item type, item status, location, call number, and price information, and so forth. It also contains three notes fields: one that displays at Checkin, one that displays in PAC (the public side), and another that is visible to library staff members only.

In this section you will learn how to search for, create, edit, copy, and delete item records.

Searching for an Item Record

You can search for an item record using StaffPAC and then use the Send to (F10) command to send the item to the Copy/Item list for editing. If you know the item barcode, you can use the Item Barcode Lookup process in the Item Record folder (Navigation Bar) to access the item record.

Follow these steps to search for an item record:

1. Press **F2** and search to a bib record.

2. Use the Send to command (**F10**) to send the record to the Copy/Item List window:

From this window you can create a new record, edit an existing record, create a single copy, batch create numerous copies, and delete item records.

Creating a New Item Record

You create a new item record from the Copy/Item List window. You can access the Copy/Item List window from the MARC Editor, or by searching for a record and using the Send to command.

Follow these steps to create a new item record:

1. Search for a title and send it to the Copy/Item List window.

2. Click **New** to create a new item record.

3. Complete the fields in the newly created record.

4. Click **Save** to save your changes.

5. Click **Close** to close the newly created record.

   The system displays the newly created record in the Copy/Item List window.

Copying an Item Record

When creating an additional copy of an item record, it is generally faster to duplicate the existing record and then make changes to the copy. You can copy item records one at a time or in a batch create.

F o l l o w   t h e s e   s t e p s   t o   c o p y   a n   i t e m   r e c o r d :

1. Send an item to the Copy/Item List window.

2. Select (highlight) the item you want to copy

3. Select File, Copy Record. Horizon displays a copy of the item record that you selected from the Copy/Item List window:

4. Update the fields in the item record. Some fields may be pre-populated with default data, based on your profiling for copied records.

5. Click **Save** to save your changes to the new item record.

6. Click **Close** to close the item record and redisplay the Copy/Item List window. You will see the newly created item in the list.

Editing an Item Record

Your library defines the fields that display on the item record and the order in which they display. The records on your system may vary in content and order from those shown here.

Follow these steps to edit an item record:

1. Send an item to the Copy/Item List window.

2. Select (highlight) the item you want to edit.

3. Click **Edit** to edit the item record. Horizon displays the Edit Item window:

4. Update the fields in the item record.

Use the **Page Up** and **Page Down** buttons to move forward and backward through the record. Screen size and screen resolution settings will have an effect upon display sizes.

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5. Click **Save** to save your changes to the updated item record.

6. Click **Close** to close the item record and redisplay the Copy/Item List window. You will see the newly edited item in the list.

Deleting an Item Record

You delete item records from Horizon at the Copy/Item List window. You can delete items that have a status which allows deletion. For example, Horizon does not let you delete items that are currently checked out, overdue, or that have a hold against them.

Follow these steps to delete an item record:

1. Send an item to the Copy/Item List window.

2. Select (highlight) the item you want to delete.

3. Select File, Delete Record to delete the item record. Horizon displays a confirmation dialog box to ensure you don't inadvertently delete an item by mistake:

4. Click **OK** to delete the record. Click **Cancel** if you changed your mind and do not want to delete the record.

   Horizon returns you to the Copy/Item List window.

Training Exercises

As a part of your Horizon Implementation, Dynix ships you a small server loaded with a control training database. The exercises in this section are matched to the control database.

The instructions sets are organized so that you can move staff members through training concurrently. Don't worry about changing records in your training database. You're not going to hurt anything. Just have fun.

Practice Set 1

This practice set of training exercises reinforces the skills you learned as you moved through your Horizon Basic Cataloging training. If you need help completing any of these tasks, refer to the appropriate section of this manual where steps to perform the task are given.

MARC Editor

1. Search the Horizon database for a title.

2. Send the record to the MARC Editor.

3. Edit the record (Edit menu options) by doing these things:

   - Delete the red (error text) 999 tag.
   - Add a 520 summary notes tag and provide a summary of the book in the a subfield.
   - Add a 650 (subject heading) tag. Create the heading for "tropics." Be sure to use your Browse Link command to check against the authority catalog and make sure the heading does not already exist.
   - Add another 650 tag. This time use the Browse Link command and connect with the subject heading "Philippines—description and travel."
   - Misspell a word in your 245 tag; perform a spell check on your work.

4. Select **Ctrl +S** to save the changes made to the record.

5. Duplicate the record you just updated. Alter it slightly and save it.

6. Duplicate the record again. Make minor changes to the third record. You should have three bib records open in the MARC Editor at this point.

7. Cut the summary notes (520 tag) from all records. Be sure to use the Cut command (**Ctrl + X**) to do this. You will have a copy of the 520 tag in your clipboard.

8. Place your cursor at the bottom of one of the records and paste the information from the clipboard back into the record.

9. Select Window, Tile Vertically to position the open bib records side by side. Select a field from one record and drag it (copy it) into another record. Add additional notes to your record, if you would like to.

10. Use the right mouse click button to edit the record as you like.

11. Use the File, Delete Record option to delete your duplicate bibs.

Copy/Item List Window

1. Search the Horizon database for a title: "Blue Bay Mystery."

2. Send the record to the Copy/Item List window.

3. Edit the record by doing these things:

   - Change the barcode (use any 10-digit number).
   - Change the location to "Main."
   - Add Baker & Taylor into the Source field.
   - Add a price of 19.95 in the Price field.

4. Click Save to save your changes.

5. Click Close to close the item edit window.

   Horizon redisplays the Copy/Item List window.

6. Copy the item record that you just created. Change its barcode and owning location.

7. Delete the second item record you just created.

8. Click **Esc** to dismiss the Copy/Item List window.